TIMEWORKS®

User's Manual

Swiftax™

For Commodore 64 and 128 Computers*
(40 Column, 64K)

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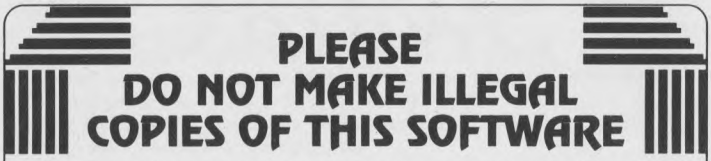

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IRS Letter of Approval

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

Timeworks
Attn: Nicholas A. Alexander
444 Lake Cooke Road
Deerfield, IL 60015

31 AUG 1989

Dear Mr. Alexander:

This is in response to your letter of August 1, 1989, requesting review of substitute Forms 1040-Schedules A through E, F, R, SE, 2106, 2441, and 8615.

Your forms are approved for Tax Year 1988 use only, as they are in the 1988 format. However, the Tax Year 1989 identification in the upper right corner must be changed back to 1988.

There are substantial changes proposed to several of the official IRS versions of these forms for 1989. To assist you in your future forms development we are enclosing copies of two early release packages of selected forms.

Due to your judicious use of graphics, in conjunction with their overall quality, your forms may be printed and filed on plain white paper. It will not be necessary to provide additional underlining of the text where you prefer to do so.

Thank you for your cooperation and participation in the IRS Substitute Tax Forms Program. If we can assist you further, please let us know.

Sincerely,

George R. Hoover
Substitute Forms Program
Coordinator R:R:R

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

Timeworks
Attn: Nicholas A. Alexander
444 Lake Cook Road
Deerfield, IL 60015

30 OCT 1989

Dear Mr. Alexander:

This is in response to your letter of October 24, 1989, requesting approval for substitute Forms 1040-Schedules A through SE, 2106, 2119, 2210, 4797, 8615, 8814, etc.

As the majority of the official forms have not been finalized and released yet for Tax Year 1989, we cannot review or approve all the forms you submitted.

However, we are pleased to approve your Forms 1040-Schedules A through SE, 2441, 4562, and 4797, with the following minor changes.

We are enclosing a copy of the forms requiring changes, with the changes annotated in red. Following incorporation of these changes it is not necessary to resubmit the cited forms for additional approval.

Thank you for you cooperation and participation in the IRS Substitute Tax Forms Program. If we can assist you further, please contact us on 202-535-6889.

Sincerely,

George R. Hoover
Substitute Forms Program
Coordinator R:R:R

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1 INTRODUCTION

SWIFTAX is a comprehensive, easy-to-use tax preparation program. Whether you file Form 1040EZ (the simplest of the tax forms), Form 1040A or Form 1040, SWIFTAX guides you through the process of preparing your tax return. Once your return is completed, SWIFTAX uses your printer to print your return directly onto IRS forms or onto blank paper.

System Requirements

To run SWIFTAX, you will need:

- A Commodore 64, 64c or 128 (in 64 mode) computer.
- A Commodore 1541, 1571, or MSD dual drive.
- A Commodore 1525/1526; Epson; Okidata; or compatible printer.

What's in the Package?

Your SWIFTAX package should contain the following:

- One SWIFTAX disk (Sides 1 and 2).
- This user's manual.
- A card to order *The Price Waterhouse Personal Tax Adviser* book.
- An update and exchange policy card.
- A SWIFTAX re-order card.

- A Software Registration card, which you must complete and return in order to receive technical support.

If you are missing any of the above, contact our Timeworks Customer Support Department for a replacement.

How to Use This Manual

As you read the manual, you will notice that the keys you're instructed to press all appear in rounded corner boxes that resemble the keys on your keyboard. Words that you are asked to type in appear in a **bold type**, selected to resemble typewriter type. The cursor, or arrow, keys will be shown like this: [⇄] [↑↓].

Twelve Simple Steps to Filing Your Tax Return

Here is a quick summary of the steps you will go through to get SWIFTAX installed and into action. Once you've read them, you'll realize how easy it is to complete your tax return with SWIFTAX.

1. First, organize your tax records and other relevant information and have it handy. This information should include:

    - Copies of your tax returns from previous years.
    - Your W-2 and/or 1099 Forms.
    - Business records
    - Receipts
    - Canceled checks
    - Other records or documents you think you may need.

2. Make copies of both sides of your SWIFTAX disk. The copy of Side 1 will be your program disk and the copy of Side 2 will be your data disk. If you want to prepare tax returns for more than one taxpayer, make an additional copy of Side 2 for each additional taxpayer. Each taxpayer must have his or her own data disk.

3. When you're ready to start preparing your tax return, load the SWIFTAX program into your computer, following the instructions in Chapter 2. Now, you're ready to get down to the business of filling out your return.

4. To begin, name your taxpayer file and set the configuration of your system in the General Configuration Window.

5. Review the SWIFTAX function keys by pressing [Alt] [F]. These keys will simplify the task of working with the program.

6. Pull down the FILE menu and select About SWIFTAX to read about completing your tax return.

7. Select the Update File option to read about any last minute changes or additions to the SWIFTAX program which are not in this manual. You can also read about changes in the tax laws, if any, which may affect your return by selecting "Tax Law Changes."

8. Then, select the Taxpayer Info option on the FORMS menu and enter the information requested.

9. Before you choose a tax form, read the Information on Supporting Forms and Schedules in Chapter 4.

10. Next, select the correct tax form for you from the FORMS menu.

11. Complete the tax forms and schedules following the line-by-line screen directions.

12. Print out and mail your tax return.

And you're finished! That's how easy it is to use SWIFTAX!

2 GETTING STARTED

Installing SWIFTAX

Creating Your Work Program and Data Disks

Before you can run SWIFTAX, you will need to make a copy of Side 1 of the SWIFTAX disk and one or more copies of Side 2. Label your copy of Side 1 as the SWIFTAX Program Disk. Label EACH copy of Side 2 as a SWIFTAX Data Disk.

If you want to prepare tax returns for more than one taxpayer, make an additional copy of Side 2 for each additional taxpayer. Each taxpayer file is limited to one per data disk.

Once you have made all the copies, put the original SWIFTAX disk in a safe place.

SWIFTAX Copy Programs

If you do not own any copy programs, two copy programs have been provided on Side 1 of the SWIFTAX Program Disk. The instructions for running these copy programs follow.

1. Make sure your computer, disk drive and printer are properly hooked up and turned on.

NOTE: If you are using a Commodore 128, you should be in the C64 mode.

- Turn on your computer, disk drive and monitor.
- Type **GO 64** and press [RETURN].
- When asked ARE YOU SURE?, press **Y** and then press [RETURN].

2. Insert Side 1 of the SWIFTAX Program disk into your disk drive (Device 8, Drive 0) and close the drive door.

3. If you have only one 1541, 1571 or MSD disk drive, type **LOAD"SINGLECOPY",8** and press [RETURN]. Otherwise, type **LOAD"DOUBLECOPY",8** and press [RETURN].

4. The copy program will be loaded into your computer. Type **RUN** and press [RETURN]. Follow the instructions on the screen to properly copy each side of your SWIFTAX disk.

After copies have been made, put the original SWIFTAX disk in a safe place and use the working disk to load and run SWIFTAX.

Loading SWIFTAX

Loading on a Commodore 128 Computer

To run SWIFTAX, you must be in the 64 mode. To do this:

1. Turn on your computer, disk drive and monitor.

2. Type `GO 64` and press RETURN.

3. When asked ARE YOU SURE?, press `Y` and then press RETURN.

4. Your Commodore 128 computer should now be in 64 mode.

5. Follow the instructions in "Loading on a Commodore 64 Computer."

Loading on a Commodore 64 Computer

1. Make sure your computer, disk drive and printer are properly hooked up and turned on.

2. Insert your program disk into your disk drive and close the drive door.

3. Type `LOAD"SW",8,1` and press RETURN.

4. The SWIFTAX program will be loaded into your computer, and the title screen will appear. Press any key to continue.

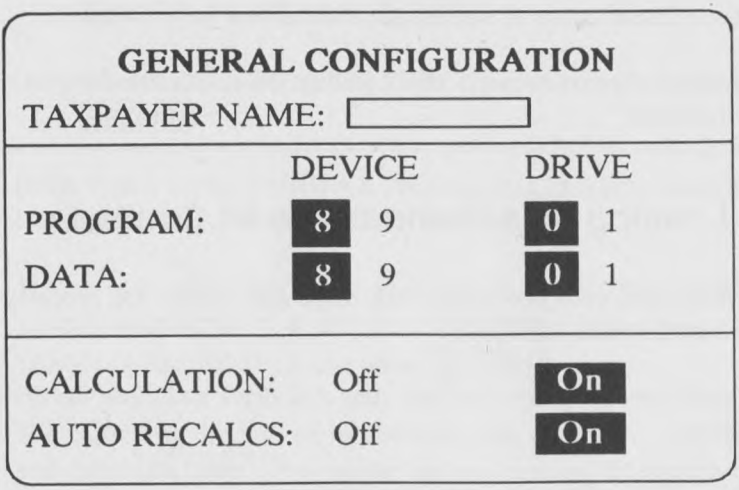
5. Follow the disk prompts, pressing RETURN after each prompt.

6. If you are running SWIFTAX for the first time, the General Configuration window will be displayed. There are some choices you must make here before you can continue. Refer to the next section, "Creating a Taxpayer File."

If you have already worked with SWIFTAX, taxpayer information will be loaded into the computer, and the SWIFTAX menus will appear on the screen.

Creating a Taxpayer File

The General Configuration window will appear if you are running SWIFTAX for the first time.



1. Enter a four character Taxpayer I.D. name and press **RETURN**.

2. Next, you must enter your hardware configuration.

   SWIFTAX assumes that you have a one drive system (device 8, drive 0). If this is the case, press **RETURN** four times to accept Device 8, Drive 0 for both your program and data disks. If you plan to load the program from or save data to a drive with device number 9, use ⇄ to highlight 9 and press **RETURN**. If you are using an MSD Double Drive System *only*, use ⇄ to highlight 1 for the Data Drive and press **RETURN**.

3. All of the SWIFTAX forms or schedules contain fields whose values are calculated based on other fields. If CALCULATIONS is ON, SWIFTAX will automatically calculate the values for the field where your cursor is located. Generally, you will leave this ON. If Calculations is turned off, the calculations must be made manually. To turn off CALCULATIONS, use [⇄] to highlight OFF. Press [RETURN] to move to the next option.

4. SWIFTAX has an AUTOMATIC CALCULATION feature that will continuously recalculate the entire form or schedule after an entry is made. Let's say you make a change to Line 7 of the form that you are in and you have AUTO RECALCS turned on. The entire form will be recalculated based on the change for Line 7. All previous values that might have been based on the old value in Line 7 will be overwritten.

   To turn AUTO RECALCS off, use [⇄] to highlight OFF and press [RETURN]. If you turn AUTO RECALCS off, the only way to recalculate an entire form is by pressing [C=][R].

5. Press [C=][S] to save your changes and exit from the General Configuration window. The SWIFTAX menus will appear on the screen.

3 GETTING AROUND IN THE PROGRAM

Pull-Down Menus and Quick Keys

SWIFTAX features both pull-down menus and quick keys. Every time you load SWIFTAX into your computer, four menu headings will appear:

FILE PRINT FORMS SCHEDULES

Press the [←→] arrow keys to move from one menu to another. Once you've selected the menu you want, use the [↑↓] arrow keys to highlight the desired menu option, then press [RETURN] to select it.

To the right of each menu option is a Quick Key. You can select any of the menu options by simply pressing the corresponding Quick Key. For example, if you are at the FILE menu heading, press [C] to select the "Change Taxpayer" menu option.

Cursor Movement Keys

The [←→] [↑↓] arrow keys are used throughout the program for moving horizontally or vertically by single steps. These keys may move a highlight or the cursor. When you are working with a form, for instance, the [←→] keys will move the cursor right or left within

the current field, while the [↑↓] keys will move you up to the previous field or down to the next field.

[↑↓]	Next Field
[SHIFT] [↑↓]	Previous Field
[⇄]	Next Character
[SHIFT] [⇄]	Previous Character

You can use a joystick in port #2 (on the left) as a substitute for the [⇄], [↑↓] and [RETURN] keys. Move the joystick left and right for [⇄] and up and down for [↑↓]. Pressing the fire button is the same as pressing [RETURN].

Function and Command Keys

There are some keys that operate the same way everywhere in SWIFTAX:

[RUN/STOP] or [←]—Escape (located at the upper left of your keyboard).

[RETURN]—Complete entry or select menu option.
[INST]—Insert a character ([SHIFT] [INST/DEL]).
[DEL]—Delete a character to the left of the cursor.
[CLR]—Clear the current field ([SHIFT] [CLR/HOME]).
[HOME]—Moves the cursor to the first character in the current field.

[F1] **Move to the next page**—Press [F1] to move down to the next screen.

[F2] **Move to the previous page**—Press [F2] to move up to the previous screen.

[F3] **Bottom of form**—Press [F3] to jump to the bottom of a form.

[F4] **Top of form**—Press [F4] to jump to the top of a form.

[F5] **Move to the next record** in attachments and lists.

[F6] **Move to the previous record** in attachments and lists.

[F7] **Move to the next field** in attachments and lists.

[F8] **Move to the previous field** in attachments and lists.

[C=] [S] **Save & Exit**—Press this to save your entries in all forms, schedules, attachments and the configuration screens. The data will be saved to disk, and you will return to the menus.

[C=] [R] **Recalculate**—Press [C=] [R] to redo all the calculations in the entire form. You can do this at any time, whether Auto Recalc is on or not.

[C=] [C] Call up the Calculator.
[C=] [D] Delete a record in a list or attachment.
[C=] [F] View the active Function Keys.
[C=] [H] HELP
[C=] [Q] Quit SWIFTAX
[C=] [T] Transfer the Calculator's displayed value to the form.

You can also select Quit from the FILE menu.

Getting HELP

Press [C=] [H] to obtain additional information, explanations or instructions for a form, schedule or attachment.

Use [↑↓] to move the cursor to the line of information you want. Press [F1] to move down a page at a time, [F2] to move up a page at a time, [F3] to move directly to the end of the information and [F4] to move back to the top.

Press [←] to exit the HELP window.

Besides the regular help screens, press [C=] [F] to view a summary of all the special keys used in the program. Those function keys that are currently active appear highlighted. Press any key to exit this screen.

The Calculator

SWIFTAX has a built-in calculator so you can make your tax calculations without ever leaving the program. You can use the calculator at any point in the program by pressing [C=] [C].

It looks and works much like a real calculator. The calculator performs the following functions:

+ Add
- Subtract
* Multiply
/ Divide
↑ Raise to a Power (exponentiation key)
: Change Sign from + to - or from - to +

As you type numbers on your keyboard, they will appear in the calculator window on your screen. Then, press the key for the operation. Enter the second number of your equation and press the [=] key or [RETURN]. The answer will appear in the calculator window.

To erase the most recent entry, press [E]. To clear everything currently in the calculator, except whatever is in the calculator's memory, press [C].

If you enter a positive number, you can change it to a negative number by pressing the [:] key. You must do this, however, before you press an operation key (+, -, *, /, or ↑). Reverse any sign by pressing [:].

Like many other calculators, this one also has memory and recall functions. To store the result of a calculation, press [M]. To recall the number later, press [R].

To transfer the number currently on the calculator display into your form or schedule, press [C=] [T].

When you finish with the calculator, press [←] to return to the point in your program where you left off.

4 PREPARING YOUR TAX RETURN

Saving Your System's Configuration

You can modify the system configuration choices in the General Configuration Window at any time. Select General Config from the FILE menu. See the section "Creating a Taxpayer File" for complete instructions on these options. When you are finished making changes, press [Alt] [S] to save your changes and exit. If you want to use the changes but don't want them saved, press [Alt] [O].

Reading about SWIFTAX

First, please select About SWIFTAX. To view this:

1. Select About SWIFTAX from the FILE menu.

2. Press [←] to return to the main menu.

Please read the Update File before going any further. The Update File contains any additional information about this version of SWIFTAX which has occurred since the manual went to press.

To view the update file:

1. Select Update File from the FILE menu.

2. Use [↑↓] to move through the update file.

3. Press [←] to return to the main menu.

Tax Law Changes

Many of the current tax forms and calculations are different in some way from their counterparts of last year. To view a summary of these changes:

1. Select Tax Law Changes from the FILE menu.

2. Press the [↑↓] keys to move through the summary of changes.

3. Press [←] to return to the main menu.

The Taxpayer Information Window

Before completing any forms or schedules, you must first enter information into the Taxpayer Information Window. The Taxpayer Information Window records the taxpayer's filing status, name, address, Social Security number, occupation, exemptions, wages, IRA and Keogh contributions, and federal income tax withheld. To complete the Taxpayer Information Window:

1. Select Taxpayer Info from the FORMS menu.

2. Select your filing status. Use [↑↓] to highlight your filing status and press [RETURN].

3. The Taxpayer Information Window will be displayed on the screen. Enter your last name and press [RETURN]. Enter all other requested information, pressing [RETURN] after each entry. If you're not sure what to enter, press [C=] [H] for Help.

4. When you have completed the Taxpayer Information Window, press [C=] [S] to save your data.

SWIFTAX will automatically display wages, IRA and Keogh contributions, Federal tax withheld in the appropriate fields of your 1040 forms. If you need to make changes to wages, IRA or tax withheld, return to the Tax Information Window.

Deciding on the Proper Tax Forms

Now that you have entered your Taxpayer Information, it's time to choose the tax return best suited to you. SWIFTAX completes three tax returns: 1040, 1040A and 1040EZ. Read the IRS instructions for the various tax forms and select the one that meets your circumstances.

Form 1040—U.S. Individual Income Tax Return

This is your main tax return form and must be filed if your taxable income is $50,000 or more, if you intend to itemize deductions or if you claim any tax credits. It summarizes the totals from all other forms and schedules.

Form 1040A—U.S. Individual Income Tax Return, Short Form

This is your main tax return form if you do not itemize and your taxable income is less than $50,000.

Form 1040EZ—U.S. Individual Income Tax Return

This is your entire tax return if you are single, have taxable income of less than $50,000, claim only yourself as a dependent, do not itemize and have interest income less than $400.

Completing Your Tax Return

Now it's time to start entering your tax information onto the appropriate tax forms.

Select 1040, 1040A or 1040EZ from the FORMS menu. The selected form will be loaded and displayed on the screen.

Move through the form typing your tax information or accepting automatically calculated entries. Press [RETURN] to complete the entry in each field.

As you move through 1040 or 1040A, you will notice references to other forms, schedules, attachments or lists with the instruction to press [⌘][G]. This is the "go to" key. The [⌘][G] key will LINK you with the associated form, schedule or list. Press [⌘][G] and complete the form or schedule. When you have completed the

linked form or schedule, press [C=] [S] to save and return to the 1040 or 1040A form. If you press [←], you will return to 1040 or 1040A without saving.

WARNING: In order to make sure your tax forms are updated properly, we recommend that you work your way down the 1040 Form and "link" into the other forms and schedules as needed.

Sometimes you may link through more than one form, schedule or list. For example, you may link from Form 1040 to Schedule A and then link from Schedule A to a list for Real Estate Taxes. SWIFTAX will remember all the links that you made.

To move around in a schedule or form, press [F1] to move down to the next screen and [F2] to move back to the previous screen. Press [F3] to jump to the bottom of the current form and [F4] to jump to the top of the form.

In lists and attachments, press [F5] to move to the next record and [F6] to go back to the previous record. To move to the next field, press [F7] and press [F8] to go back to the previous field.

Press [RETURN] to complete or accept each entry. To view the function keys, press [C=] [F]. Active function keys appear in a brighter type.

When you have finished your Form 1040, 1040A or 1040EZ, linking to every necessary form, schedule and attachment, press [C=] [S] to save.

You can go back to any form by selecting it from the FORMS menu. The schedules can be selected from the SCHEDULES menu. To access the attachments and lists, move to the line that references the list and press [C=] [G]. For example, when you are asked to itemize the sales of assets or property in Schedule D, you can move

to the line that references that list and press [C=][G]. The Attachment window will appear. When you finish entering your information, press [C=][S] to save the attachment, and the total will appear in the appropriate line.

Supporting Forms and Schedules

As you fill in Form 1040 or Form 1040A, you may need to complete some supporting forms and schedules. Position the cursor on the line that refers to the supporting form or schedule and press [C=][G] and the form or schedule will appear. Type in the information and then press [C=][S] to save. The calculated amounts from the accompanying schedules will appear on the line they are linked to. All of the forms and schedules that SWIFTAX can complete are described here.

For additional information, explanations or instructions for a form, schedule or attachment, highlight the form or schedule on the pull-down menu and press [C=][H].

In some forms and schedules, for easier data entry, SWIFTAX displays the entry fields in a different order than the IRS forms. For example, you would fill in lines 13 through 20 of Schedule 1 before lines 1 through 12.

Schedule for Form 1040A

Schedule 1

Use this schedule for claiming credit for child and dependent care expenses. You will also need to use this schedule if you received over $400 in interest or dividends.

Schedules and Forms for Form 1040

Schedule A—Itemized Deductions

Some taxpayers will save money by itemizing their deductions. If you itemize, you can deduct part of your medical and dental expenses and unreimbursed employee business expenses and amounts you paid for certain taxes, interest, contributions and certain miscellaneous expenses. You may also deduct certain moving expenses and casualty and theft losses.

Schedule B—Interest and Dividend Income

Use Schedule B if you are filing Form 1040 and you:

- Had more than $400 in taxable interest,
- Had more than $400 in dividends,
- Had a foreign account, or
- Were a grantor of, or transferor to, a foreign trust.

Schedule C—Profit or Loss from Business

If you operated a business or practiced a profession as a sole proprietorship, complete Schedule C. If you had more than one business, or if you and your spouse had separate businesses, you must complete a separate Schedule C for each business (SWIFTAX can complete up to three Schedule Cs for each taxpayer). Farmers should use Schedule F.

Schedule D—Capital Gains and Losses

Use Schedule D to:

- Report a sale of a capital asset.
- Report gains from involuntary conversions of capital assets not held for business or profit.
- Reconcile Forms 1099-B you got for bartering transactions (see Part VI of the schedule).
- Make the long-term capital gain election for lump-sum distributions.

At the line titled "Sale of Assets," you will see two attachment fields—one for short-term and one for long-term sales transactions. Enter all Line 2a and 2d transactions in the short-term attachment and all Line 9a and 9d transactions in the long-term attachment.

Schedule F—Farm Income and Expenses

Use Schedule F to report farm income and expenses. SWIFTAX completes one Schedule F for you and one for your spouse.

Schedule R—Credit for the Elderly or the Disabled

Schedule R is used to figure the credit for the elderly or the disabled. You may be able to take the credit if, by the end of the year:

- You were 65 or over, or
- You were under 65 and you retired on permanent and total disability and you received taxable disability income.

Schedule SE—Social Security Self-Employment Tax

If you are subject to self-employment tax, use Schedule SE to figure any tax due on net earnings from self-employment. You may also have to pay this tax on wages you were paid as an employee of an electing church or qualified church-controlled organization. The Social Security Administration uses the information from Schedule SE to figure your benefits under the social security program. This tax applies no matter how old you are. It applies even if you are already getting social security benefits.

You must file Schedule SE if:

- You are self-employed, and your net earnings from your business were $400 or more. (Or you had wages of $100 or more as an employee of an electing church or organization controlled by a church.)

AND

- Your wages (including tips), other than medicare qualified government wages, were less than the amount specified by the IRS. See the Schedule SE instructions for this amount.

Most taxpayers can now use the short Schedule SE, but complete Section B (long SE) if any of the following applies:

- You choose the "optional method" to figure your self-employment tax. See Section B, Part II of the schedule.

- You are a minister, member of a religious order, or Christian Science practitioner, and received IRS approval (from Form 4361) not to be taxed on your earnings from these sources, but you owe self-employment tax on other earnings;

- You are an employee of a church or church organization that chose by law not to pay employer Social Security taxes;
- You have tip income that is subject to Social Security tax, but you did not report those tips to your employer; or
- You are a government employee with wages subject only to the 1.45% Medicare part of the Social Security tax.

SWIFTAX can complete one Schedule SE each for you and your spouse.

Form 2106—Employee Business Expenses

Form 2106 is for employees who are deducting the following job-related expenses:

- Outside salesperson expenses.
- Travel, transportation, meals, lodging and other qualified business expenses applicable to this form for an employee other than an outside salesperson.

You do not need to complete this form if you report your expenses to your employer by means of an account book, diary or similar statement; your business expenses equal your reimbursement; and the reimbursement was not included on your W-2 form. See the separate IRS instructions for Form 2106.

SWIFTAX can complete one Form 2106 each for you and your spouse.

Form 2441—Credit for Child and Dependent Care Expenses

This form is for calculating a tax credit for amounts you paid someone to care for your child or other qualifying person so you could work or look for work. The credit, which is based on a percentage of the amount you paid during the year, will lower your tax.

Form 8615—Computation of Tax for Children under Age 14 with Investment Income over $1,000

For children under age 14, investment income (such as taxable interest and dividends) over $1,000 is taxed at the parent's rate if the parent's rate is higher than the child's rate.

Consult IRS Publication 929, Tax Rules for Children and Dependents, for additional details.

Form 8814—Parent's Election to Report Child's Interest and Dividends

Use this form if you are a parent and choose to report your child's income on your return. Consult IRS Publication 929, Tax Rules for Children and Dependents, for additional details.

SWIFTAX completes up to three Form 8814s for each taxpayer file.

The Tax Return Status Window

If you can't remember which tax return forms you have completed, you can find out very quickly using the Status option. Here's how:

1. Select Status from the FILE menu.

2. The Tax Return Status Window will display all the forms and schedules with a checkmark next to those that have been completed.

3. When you are finished viewing, press [←] to return to the menus.

5 PRINTING YOUR TAX RETURN

Selecting a Printer

Not all printers and printer interfaces work the same way. What might work for one printer may cause another to print strange characters or not print at all. You can modify printer options in SWIFTAX through the Printer Configuration menu option.

1. Select Printer Config from the PRINT menu. The Printer Configuration window will be displayed on the screen.

PRINTER CONFIGURATION		
DEVICE NUMBER:	4	5
SECONDARY ADDRESS: (255 for MPS1000)	7	
PRINTER PITCH: (10.9 for 1526)	10	
Continuous Form		Single Sheet
Normal ASCII		Commodore ASCII
No Linefeeds		Add Linefeeds
CONTROL CODES:	0, 0, 0, 0, 0, 0	

2. The number 4 next to DEVICE NUMBER will be flashing. Most printers use 4 as their device number. Press the [⇄] key to

highlight the device number for your printer, if necessary, and press [RETURN].

3. The next option is the secondary address. Most printers use 7 as the secondary address. You may want to modify the secondary address if your interface has trouble operating with this program. (Consult your interface manual for more information on secondary addresses.) Type in the new secondary address and press [RETURN].

4. Next, enter the printer pitch. Printer Pitch refers to the number of characters printed across an inch. Most printers print ten characters per inch, but some print twelve. Consult your printer manual for the proper setting. Type in the printer pitch for your printer and press [RETURN].

5. If your printer uses individual sheets of paper, press the [⇄] key to highlight SINGLE SHEET and press [RETURN]. Otherwise, highlight CONTINUOUS FORM and press [RETURN].

6. If your printer expects Commodore ASCII characters, highlight COMMODORE ASCII and press [RETURN]. If not, press [RETURN] to accept NORMAL ASCII. Commodore ASCII is Commodore's version of ASCII. The main difference between Commodore ASCII and normal ASCII is the coding used to differentiate upper and lowercase characters.

7. If your printer expects a linefeed after each printed line, highlight ADD LINEFEEDS and press [RETURN]. Otherwise, press [RETURN] for NO LINEFEEDS.

8. If your printer requires some special codes to be sent for printing, type in each code and then press [RETURN]. Usually you will not need to enter any codes. Consult your printer manual for details.

9. When you have made all the necessary choices about your printer, press [C=] [S] to save the information.

Printing to Paper

All forms, schedules, attachments and lists except for Form 1040, 1040A and 1040EZ are IRS approved and can be printed in the Print to Paper format and submitted in place of the forms you receive from the IRS.

SWIFTAX prints Forms 1040 and 1040A in two ways—Print to Paper format and Print to Forms format. Form 1040 and 1040A must be printed directly onto IRS forms (using Print to Forms) or completed by hand before submitting to the IRS. Before printing your tax return onto IRS forms, it's a good idea to print your return on plain paper. You can check your numbers before printing or transferring the information onto the official IRS forms.

NOTE: Because of the layout of the 1040EZ form, it can only be printed with the Print to Paper option. If you plan to submit the Form 1040EZ, you will have to transfer the figures by hand.

To be accepted by the IRS, these substitute forms (printed with the Print to Paper option), must be underlined. SWIFTAX automatically underlines if ADD LINEFEEDS is selected in the Printer Configuration. If your printer or printer interface automatically adds linefeeds, make sure both are set to not add linefeeds, so that SWIFTAX can add the linefeeds and underline as well. Check your printer and interface manuals for details.

If your printer does not underline, you can use lined or color-banded paper instead. Or load **"LINE",8** from your Disk Side 1 and type **RUN** to pre-print lines on blank paper.

To print your tax forms onto plain paper:

1. Select Print to Paper from the PRINT menu.

2. A window will display all the forms and schedules with a checkmark next to those that have been completed. Press the [↑↓] keys to highlight the form or schedule you want to print and press [RETURN]. SWIFTAX will load the data for the form or schedule selected.

3. You will be prompted to align the top of your printer paper with the ribbon. When you are ready, press [RETURN], and the form will be printed.

4. When the form is printed, the Form Selection window will reappear. If you want to print another form or schedule, repeat Steps 2 and 3. To return to the menus, press [←].

Printing to Forms

After you have printed the other forms and schedules on plain paper, you're ready to print your Form 1040 or Form 1040A onto the actual IRS forms.

1. Select Print to Forms from the PRINT menu.

2. A window will ask if you wich to print your completed 1040 or 1040A (or both if you have completed both forms). Use [⇄] to highlight your selection and press [RETURN]. SWIFTAX will load the data for the selected form or schedule.

3. You will be prompted to insert the selected IRS form into your printer. If your printer can only handle continuous fan-fold paper, tape the form or schedule onto the paper. If your printer

can print individual sheets, insert the form into the printer. If your printer uses a printer ribbon, line up the first data field with the printer ribbon.

4. Press [RETURN], and the form will be printed.

5. If the form or schedule consists of two or more pages, you will be prompted to insert the second page into your printer. Repeat Step 3, checking proper form alignment and press [RETURN].

6. When SWIFTAX is finished printing the form, the menus will reappear.

Printing Attachments

If you have created attachments to go with your forms or schedules, these must be printed also. To print an attachment:

1. Select Print Attachments from the PRINT menu.

2. A window will display all the forms and schedules that contain attachments, with a checkmark next to those that have one or more completed attachments. Use [↑↓] to highlight the form or schedule whose attachments you want to print and press [RETURN]. SWIFTAX will load the attachment data for the selected form or schedule.

3. You will be prompted to line up your printer paper. Make sure the top of your paper is even with your printer ribbon and press [RETURN]. Your attachments will be printed.

4. When SWIFTAX has printed your attachments, the Forms Selection window will reappear. To print another attachment, repeat Steps 2 and 3.

6 LOADING ANOTHER TAXPAYER FILE

If you are finished with your taxpayer file and want to load another taxpayer file:

1. Select Change Taxpayer from the FILE menu.

2. When you are prompted to insert a new taxpayer file, insert the new taxpayer disk into the disk drive and press RETURN.

3. The files from the new taxpayer disk will be loaded and the main menus will appear. If the new taxpayer disk has not been used before, the General Configuration window will be displayed. Follow the instructions in Chapter 2 in the section "Creating a Taxpayer File."

7 APPENDIX

If, after reading this manual carefully, or while you're using SWIFTAX, you have questions about the operation of the program, phone Timeworks Customer Support Help Line at (708) 948-9208.

Before calling, please review the Pre-Call Checklist and note the Disclaimer at the front of the manual. **Remember, although we can help you with the operation of this program, Timeworks cannot offer you any tax advice!**

Pre-call Checklist

Before You Call. . .

1. Have you investigated your manual (including the Index) and the Update File thoroughly for the answer to your question?

2. Has the problem ever appeared before? What procedure did you use to produce the problem, and can you reproduce the situation? Have you tried reproducing the problem with hardware other than your own?

3. Are you using any additional equipment with your system, such as a mouse? If so, disconnect the additional hardware or software and try to repeat the problem. If not, did you change your hardware or software configurations before you first experienced the problem?

4. If the problem is related to printing, have you checked your printer manual or contacted your printer manufacturer for the answer? Have you read your interface manual or contacted your interface manufacturer?

5. Have you returned your Registration Card to Timeworks?

If You Call. . .

1. Which Timeworks product are your calling about, and what is the version number? (For example, SWIFTAX for 1989, version 1.0) You will find the version number when you view the directory of your program disk.

2. What system are you using? (For example, Commodore 64 with one drive.)

3. Have your user's manual with you when you call, and keep your manual and any other pertinent materials by the phone in case we need to call you back.

If You Write. . .

Include a phone number where you can be reached during the day.

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